
**CARROLL COUNTY PUBLIC SCHOOLS
BOARD POLICY DJA: PROFESSIONAL/TECHNICAL SERVICES CONTRACTS
ADMINISTRATIVE REGULATIONS – 2 of 2**

Administrative Procedures for the Approval of Professional Services Contracts.

I. Introduction

The successful operation of Carroll County Public Schools requires the use of professional service contracts (PSC) for a variety of services. The revenue to support approved PCS may be local, state, federal or a combination of different funding sources. Professional services may be contracted for more than one year.

PSCs are authorized for services that can only be performed by persons or entities with specialized skills and knowledge. Applicable professional/technical services provide for, but not limited to, auditors, architects, engineers, dentists, medical doctors, lawyers, educational or other consultants, teachers, accountants, systems analysts, technical services programmers, graphic artists, caterers, and educational institutions.

The Board of Education, through its policy DJA, sets forth specific direction for the authorization of PSCs. These regulations outline specific direction on procedural requirements for the procurement and authorization of PSCs.

All users of a contract should have clear understanding of procedures for the preparation, issuance and administration of contracts.

II. Authorization of PSCs – CONTRACT ADMINISTRATORS ARE RESPONSIBLE FOR ENSURING ALL REQUIREMENTS OF THE PSC ARE MET.

- A. Board of Education approval is required for Professional/Technical Service contracts with a total value over \$25,000, unless otherwise required by law.
- B. Board approval is also required if contract administrator obtains multiple PSCs with a single vendor whose cumulative total is over \$25,000 in a single fiscal year. The Board must approve all PSCs after the cumulative total of \$25,001 is met regardless of value of the individual PSC. Along with the authorization request, the Board will receive a summary of all PSCs with the vendor for the current fiscal year.
- C. The Superintendent/designee is authorized by the Board of Education to enter into PSCs \$25,000 or less. Assistant Superintendent of Administration and the Supervisor of Purchasing are the only personnel designated by the Superintendent to sign PSCs \$25,000 or less.
- D. Grant-Funded PSC
 - 1. If a grant is specifically designed to provide services in whole or in part through a PSC, the PSC must be approved prior to the submission of the grant. The Board cover sheet should outline the specifics of the grant and its conditions.

2. If the timeline of the submission of a grant that is over \$25,000 precludes Board approval of the associated PSC prior to its submission date, the contract administrator must bring the PSC to the first possible Board Meeting accompanied by the grant proposal as back-up material.

E. Exceptions to Authorizations

1. Professional/technical services provided directly to students as required by Individuals with Disabilities Education Act (IDEA)
2. Supplemental Educational Services (SES) for Title I schools identified as in corrective action under federal and state law.
3. Professional/technical services provided to students attending the Carroll County Public Schools with funds appropriated by other agencies and passed through school system accounts.
4. Professional/technical service contracts that fall under emergency procurement as previously authorized by the Board of Education.

III. Procurement of PSC

- A. All PSCs with a value of \$15,000 and greater shall be solicited by a Request for Proposal (RFP) process through the Purchasing Department with the assistance of the contract administrator.
- B. Professional services less than \$15,000 may be solicited from different vendor's quotes obtained by the contract administrator. The contract administrator must obtain written quotes from at least three (3) qualified vendors. Copies of these quotations must be submitted to the Purchasing Department, with the contract, substantiating that competitive prices were solicited. The Supervisor of Purchasing, **prior to the commencement of services**, has final approval of the PSC.
- C. If the contract administrator determines that competitive solicitation is not feasible or practical, a written explanation is required substantiating why a particular service should be exempt from this process.
- D. Contract administrators who wish to use a PSC to implement a new program or provide new services for schools must first complete and have approved a "*Program Evaluation Form*" for the purpose of evaluating the value of the program to the Carroll County Public Schools.

IV. Selection Procedures (RFP)

- A. The RFP process is performed by the Purchasing Department with the assistance of the contract administrator and consists of the following steps:

1. Defining scope of services and anticipated budget:
 - a. What services are required
 - b. What is the time frame for these services to be performed
 - c. What special qualifications are needed to perform these services
 - d. What is the budget for these services
 - e. Where is the funding source and are these funds secure
 - f. If the RFP comes in over budget, which services would you be able to forfeit

2. Preparing the RFP:
 - a. The RFP is prepared by the Purchasing Department with assistance from the contract administrator.
 - b. The provisions, terms, conditions and any addenda to the RFP become part of the contract.

3. Soliciting the RFP:
 - a. RFP is sent to qualified firms and is advertised in at least one (1) local newspaper(s).
 - b. Once the RFP has been distributed, the Purchasing Department becomes the sole contact. Any information shared with one vendor MUST be conveyed to all vendors via an addendum. All addendums will be issued by the Purchasing Department in writing and will become part of the RFP contract terms and conditions.

4. Receiving/Analyzing the RFP:
 - a. All RFPs must be returned to the Purchasing Department by the specified date and time. Late proposals will not be accepted.
 - b. The contract administrator and the Purchasing Department will evaluate and score proposals to ensure that all specifications and qualifications have been met. Selection of the most qualified vendor will be done by evaluating and scoring technical proposals. Price proposals, which may be submitted under separate cover or with the technical proposal, will be scored by an inverse proportion and added to the technical score. Interviews may be conducted with those firms meeting technical requirements, prior to evaluating price proposals.

5. Contract Negotiations:
 - a. Purchasing Department may negotiate price with the most qualified vendor if necessary.

6. Approval:
 - a. The Purchasing Department and the contract administrator agree on the successful vendor.
 - b. If the value of the contract is more than \$25,000, it is presented to the Board for approval at its regularly scheduled monthly meeting (second and fourth Wednesday of the month or a special Board meeting with recommendations for award required the week prior to the meeting).
 - c. If the value of the contract is \$25,000 or less, the Superintendent/designee approves the contract.
 - d. A Certificate of Insurance is required for all PSCs prior to approval in the amount of \$100,000 for Worker's Compensation and \$1,000,000 for General Liability.

7. Preparing PSC:
 - a. The contract administrator, using standard Board of Education forms, prepares the contract and requisition.
 - b. Contracts and requisitions are forwarded to Supervisor of Purchasing for approval and generation of purchase order.

8. Emergency Procurement:
 - a. As outlined in COMAR, Title 21, 05,06 events may necessitate the awarding of a professional/technical services contract under the emergency procurement provision. The Superintendent, without competitive bidding or Board action, because of urgent circumstances that require expedited action, may award the procurement of services in excess of \$25,000, and the action is in the public interest and outweighs the benefit of the procurement procedures outlined in these regulations.
 - b. If such circumstances exist, the contract administrator will contact the Supervisor of Purchasing and provide the rationale for emergency procurement.
 - c. The Supervisor of Purchasing will provide the request to the Assistant Superintendent of Administration who, in turn, will inform the Superintendent of Schools.
 - d. The Superintendent of School will make the final determination on the validity of the request for emergency procurement.

Note: **Services cannot commence until after approval is received.**